

HOW TO PROCESS WORKING AGED (WA) TRANSACTIONS
(January 2001)

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HOW TO PROCESS WORKING AGED (WA) TRANSACTIONS (January 2001)



PART B CARRIER CHANGE:

Effective January 2001, the Part B Carriers will no longer perform CWF MSP updates to the CWF. As of this date, certain WA transactions that your Managed Care Organization (MCO) cannot update must be sent to the HCFA's newly established Coordination of Benefits contractor (COB), who is General Health Incorporated (GHI) located in New York, for an update. For more information, read the COB section below and also read the December 12, 2000 Working aged letter posted on HCFA's website <http://www.hcfa.gov/medicare/workaged/waproc1.htm>. **PLEASE BE AWARE THAT THIS IS A MANUAL SUBMISSION PROCESS AND YOUR MCO IS RESPONSIBLE FOR SENDING THESE TRANSACTIONS TO THE COB BY MAIL.**

OUTLINE OF THE WORKING AGED SUBMITTAL PROCESS

Survey your members at enrollment and again yearly to determine correct working aged status. The Managed Care Organizations (MCO) submit working Aged transactions to the Health Care Financing Administration by using electronic transfer, online McCoy system or a third party vendor (i.e., Axcion Computer Services). HCFA does not process the transactions, but acts as a conduit.

HCFA edits the transactions and sends them to General Health, Inc. (GHI) who also performs edits on the data then forwards the transactions to the Common Working File (CWF) Host sites, who process the transactions.

Each WA transaction submitted electronically by an MCO will receive a status and is entered into McCoy. Possible statuses received for plan-submitted working aged transactions in McCoy are: N, U, G, S, P, A and R. Please refer to the Plan Communications Users Guide for a description of these statuses. Statuses of all transactions submitted appear in the McCoy Working Aged screens, and the Working Aged Transaction Status Report.

NOTE: Transactions that do not pass the preliminary edits (i.e., incomplete mandatory fields, invalid data, etc.) receive a U status - Unacceptable (these records will not appear on Transaction Reply Listing or sent to GHI and CWF). The MCO should make corrections and resubmit.

The transactions that do not pass the CWF/GHI edits are placed on the McCoy Working Aged Exception List as R- rejected with "SP" codes. The rejected records with "SP" codes will also appear on the Monthly Transaction Reply report.

Transactions that are accepted but not yet posted to the CWF will be reported back to the MCO on the Reply Listing as reply code 65. Rejected transactions will be reported as a reply code 68 with an "SP" code explanation. SP codes are listed in the Plan Communications Guide. Look up the SP code in the Plan Communications Guide, and take action according to those instructions.

Reply codes 59, 66, or 67 mean the transaction is posted to the CWF and can be viewed there.

NOTE: PAYMENT ADJUSTMENTS FOR PLAN SUBMITTED WA TRANSACTION PERIODS ACCEPTED BY CWF-- As a rule of thumb, check the latest MSP record's maintenance date (MNT DTE) shown on the CWF and allow at least three months from that date for any payment adjustments to occur.

Also, NOTE that you can only submit one WA transaction for a beneficiary per month as the GHP only accepts one per month.

OBTAINING CWF ACCESS (View only), HDC ACCESS and CWF Tutorial

All MCOs must have access to the HCFA Data Center (HDC) prior to obtaining access to CWF.

For HDC Access you should contact the Central office (HPPOS) regional Health Insurance Specialist. Contact information for your Regional representative can be found at the following website address <http://www.hcfa.gov/medicare/teamann.htm>.

CWF Assignment contact Gloria Webster (410) 786-7655

Available upon request is the CWF tutorial that gives an overview of the Working aged information contained in the CWF. To download tutorial via the HCFA web go to <http://www.hcfa.gov/medicare/cwfinstr.htm>

WORKING AGED BATCH FILE SUBMISSION, ELECTRONIC TRANSFER AND TESTING

Working aged transactions will be picked up for processing three (3) times a day: 11:30 a.m., 4:00 p.m., and 10:30 p.m. ET. Check MCCOY periodically after these times to ensure that your data has been received. If your data has not been received by the following day of your transmission, call the Central office (HPPOS) regional Technical Support Specialist. All transmissions must be completed prior to 8:00 p.m. ET by the LAST business day of the month. If this is your first time transmitting a working aged file please schedule a test with the HPPOS Technical Support specialist in your region. Contact information for your Central office (HPPOS) regional Technical Support Specialist can be found at the following website address <http://www.hcfa.gov/medicare/teamann.htm>.

WORKING AGED EXCEPTIONS LIST

To look up rejected Working Aged transactions submitted by your plan, logon to McCOY:
Select option 8 (McCOY plan option menu) - Working aged - View Exceptions

Please refer to the GHP Monthly Schedule for date when WA Exceptions are available.
Additionally, please check the Working Aged Transaction Status, and the Transaction Reply Listing reports available for downloading through TSO.

HOW TO IDENTIFY WORKING AGED

The criteria for WA are found in the Intermediary Manual Section 3491.

Working Aged Definition:

The beneficiary must be

- age 65
- currently working and has health insurance with that employer
- the employer must have 20 or more employees
- or the spouse is currently working and the beneficiary is covered by their insurance

If you have any questions regarding Working Aged identification, please contact Donna Dalfonzo-Wiggs on (410) 786-9289.

RECONCILIATION OF WORKING AGED PERIODS REPORTED TO YOU FROM ANOTHER SOURCE

HCFA reports Working Aged transactions received on your membership back to you by way of the **Transaction Reply Listing, and the Monthly Membership Reports**. If your information does not confirm working aged status for this member during the reported time frame, you should take the following steps to update the working aged status.

- Look up your member on the CWF (MCO must have CWF ID and password)
- Determine which working aged period does not reflect your information for your members
- Submit a HUSP record correction to HCFA using the information from the CWF screen

MCO DO's and DON'Ts

- MCO may start a working aged period, delete or end a period that MCO set;
- MCO may enter a termination date to end period started by another source (MSP Termination date must be greater than MSP effective date);

- MCO may not delete or remove a period started by another source, i.e., 33333_(11104)_or 77777_(11102);
- MCO cannot enter an end date the same as the start date if the MCO was not the source of that period ;
- MCO should not send an HUSP record to terminate a WA period showing on the CWF when the CWF VAL IND field is N (No MSP) **OR** CWF DEL IND field is D (Deleted period).

NEW PROCEDURE: COORDINATION OF BENEFITS (COB) CONTRACTOR

Some transactions must be sent to the Medicare -Coordination of Benefits(COB) contractor for action* They are:

1. Periods that need to be deleted or removed but were set by another source
2. Open periods that require an end date to be entered equal to the start date (deletion)
3. SP code 57 - source code 77777 (11102) - Term date greater than 6 months before the date of accretion (DOA) to CWF
4. CWF MSP record with MSP effective date earlier than beneficiary's date of birth at age 65.
5. SP60, SP61- Insurer Type not matching on CWF HUSP record.
6. SP53 Error Code situations. WA and Disability records both open at the same time.
7. SP71 Source Code not matching on CWF HUSP record.

* Effective January 8, 2001, the COB contractor will update CWF MSP auxiliary records that MCOs cannot update. Please refer to December 2000 Working aged letter (website address - <http://www.hcfa.gov/medicare/workaged/waproc1.htm>) addressing instructions for submitting WA/MSP activity to the COB contractor. Please send to the COB contractor the Beneficiary's survey and the CWF referral form (as mentioned in December 2000 WA letter) for exceptional Working Aged cases you cannot resolve on the CWF. Please mail information to:

MEDICARE- Coordination of Benefits Contractor
Attn: MSP Claims Investigation Project
P.O. Box 5041
New York, NY 10274-5041

The MCO should only contact the COB contractor after 50-calendar days, for the status of an update request if, the CWF has not been updated, the COB contractor has not requested additional information, or the MCO has not received any action on an update request sent to the COB contractor. You can reach the COB contractor customer service line at 1-800-999-1118.

Please note that Part B carriers will no longer perform updates to the CWF MSP records on the CWF. However, the Part B Carrier will complete any remaining inventory of WA/MSP your MCO submitted prior to January 01, 2001.

Ongoing Issues

1. SP53 error code - Working Aged and disability record both open at the same time.
2. SP60, SP61- Insurer Type not matching on CWF HUSP record.
3. If you have received any SP12 codes, please resubmit these records.(resolved Oct 1999)
4. SP71 - Source Code not matching on CWF HUSP record.

Questions about the Working Aged Survey

Contact Donna D'alfonzo-Wiggs at HCFA Central Office for information about the Working Aged survey requirements on 410-786-9289.

ACRONYMS

CWF-Common Working File
CWF Host Site-7 host sites
EDB-Enrollment Data Base
MCCOY - Managed Care Option Information
retains Plan submitted WA transactions

GHI-General Health Corp.
GHP-Group Health Plan System
MSP- Medicare Secondary Payer
WA-Working Aged
TSO - IBM's Time Sharing Option
System used for retrieval of your
GHP Monthly reports.

COMMON WORKING FILE INFORMATION

NEW Contractor numbers - Effective January 01, 2001	OLD Contractor numbers
11100 – COB contractor 11101 – Initial Enrollment Questionnaire (IEQ) 11102 – SSA/IRS Data Match 11103 – Managed Care Organizations 11104 – Litigation Settlement 11105 – Employer Voluntary Reporting 11106 – Insurer Voluntary Reporting 11107 – First Claim Development 11108 – Trauma Code Development 11109 – Secondary Claims Investigation 11110 – Self Reports 11111 – 411.25 --	-- 99999 - Initial Enrollment Questionnaire (IEQ) 77777 - SSA/IRS Data Match 55555 - Managed Care Organizations 33333 - Litigation Settlement 66666 - Provident Litigation 88888 - Voluntary Agreements -- -- -- -- -- -- 00865 - Intermediary OR Carrier

Abbreviations

DOA - Date of Accretion to CWF
MNT DTE - Maintenance Date
VAL IND - Validity Indicator
DEL IND - Deleted Indicator
HUSP- Identifies an MSP/WA transaction

WA TRANSACTION REPLY CODES***Reply Codes do not affect payment:***

65 - Working Aged Accepted but
not yet posted to CWF
68 - Working Aged Status Rejected
69 - Working Aged Pending.

Reply Codes that affect payment:

59 - Working Aged Canceled
66 - Working Aged Status Set
67 - Working Aged Status Terminated

WORKING AGED INFORMATION ON THE HCFA WEBSITE

WA letters	http://www.hcfa.gov/medicare/systinfo.htm
Fact Sheet	http://www.hcfa.gov/medicare/systinfo.htm
CWF Tutorial	http://www.hcfa.gov/medicare/cwfinstr.htm
COB instructions document	http://www.hcfa.gov/medicare/workaged/waproc1.htm

A hard copy can be made available for those plans that do not have Internet access. Please contact Central Office (HPPOS) regional Health Insurance Specialist. Allow 2 to 4 weeks for delivery.